

Brands Performing Better in APEAL Enjoy Bigger Market Share, J.D. Power Finds

Porsche and Dongfeng Yueda Kia Rank Highest Among Luxury and Mass Market Brands, Respectively

SHANGHAI: 12 Sept. 2019 – Brands with higher APEAL index scores also have better sales and market performance in China, according to the J.D. Power 2019 China Automotive Performance, Execution and Layout (APEAL) Study,SM released today.

The study, now in its 17th year, measures owners' satisfaction of automotive performance, execution and layout of new vehicles within the first two to six months of ownership, ranging from the power they feel when they step on the gas to the sense of comfort and luxury they feel when climbing into the driver's seat. At the industry level, the overall APEAL score in 2019 is 712 (on a 1,000-point scale), which continues the improvement trend since 2017.

According to the study, market share of 25 brands that perform better than industry average in APEAL index increases 3.5% from 2018. While the remaining 42 brands that rank below industry average experienced a 3.5% decline in market share from 2018.

"New-car sales in China are still struggling so automakers need to address how to get through this tough period," said **Edward Wang, Research Director, J.D. Power China**. "The good news is that there's a positive correlation between the APEAL index and the sales volume. If automakers take full consideration of the consumer experience and improve vehicle appeal, it will have a long-term positive effect on vehicle sales and recovery of the auto market."

Following are additional findings of the 2019 study:

- **Gap closes between domestic and mass market international brands:** The gap between domestic and mass market international brands is 21 points in 2019. The gap has been narrowing each year since 2009 when the gap was 70 points.
- **Fuel economy performance improves:** The APEAL scores of all 10 categories are higher than last year, especially that of fuel economy, which shows an increase of 9 points. European brands make no improvement while Korean brands make the biggest improvement (+25 points) from 2018 and outperform others in fuel economy (+36 above the industry average).
- **Consumers born in the 1980s and 1990s are more concerned about sensory experience:** The styling and appearance of vehicle front-end is the most appealing attribute for all age groups. Consumers born in the 1980s are 1990s care more about the sense of comfort of driver's seat back/headrest. Consumers born in and after 1985 are also more demanding in quality of sound from speakers than other age groups.

Study Rankings

Porsche ranks highest in APEAL among luxury brands, with a score of 784. **BMW** (760) ranks second and **Lexus** (755) ranks third.

Dongfeng Yueda Kia is the highest-ranked mass market brand, with a score of 747. **MINI** ranks second with a score of 737. **Beijing Hyundai** (734) and **Dongfeng Nissan** (734) rank third in a tie.

There are 18 other models eligible for awards across 17 segments in the 2019 study. The segment-level APEAL awards by brand are the **GAC Trumpchi GM8; GAC Trumpchi GS7 and GAC Trumpchi GS3; BMW 1 Series and BMW X1; Hyundai Lafesta and Hyundai Yuena Verna; Kia K2 and Kia K4 Cachet; Nissan Murano and Nissan Lannia; and Porsche Cayenne and Porsche Macan.**

Other models that rank highest in their respective segments are **Lexus ES; Mazda 6 Atenza; Skoda Karoq; Volkswagen Touran L; and Wuling Hongguang S/S1.**

The 2019 China Automotive Performance, Execution and Layout (APEAL) Study measures owners' emotional attachment to and level of excitement with their vehicle across 77 attributes in 10 vehicle performance categories: vehicle exterior; vehicle interior; storage and space; audio/ communication/ entertainment/ navigation; seats; heating, ventilation and air conditioning; driving dynamics; engine/ transmission; visibility and driving safety; and fuel economy.

The 2019 study is based on responses from 33,468 vehicle owners who purchased their cars between May 2018 and March 2019. The study includes 266 models from 67 different brands and was fielded from November 2018 through May 2019 in 75 major cities across China.

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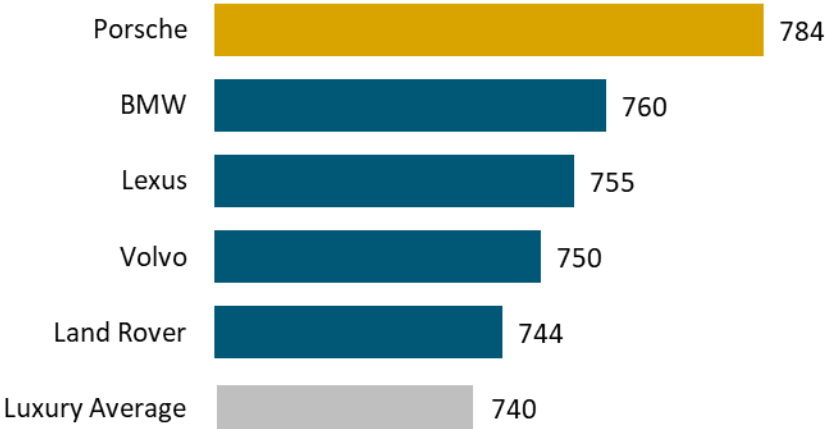
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NOTE: Four charts follow.

J.D. Power 2019 China Automotive Performance, Execution and Layout (APEAL) StudySM

2019 APEAL Brand Index Ranking - Luxury (Based on a 1,000-point scale)



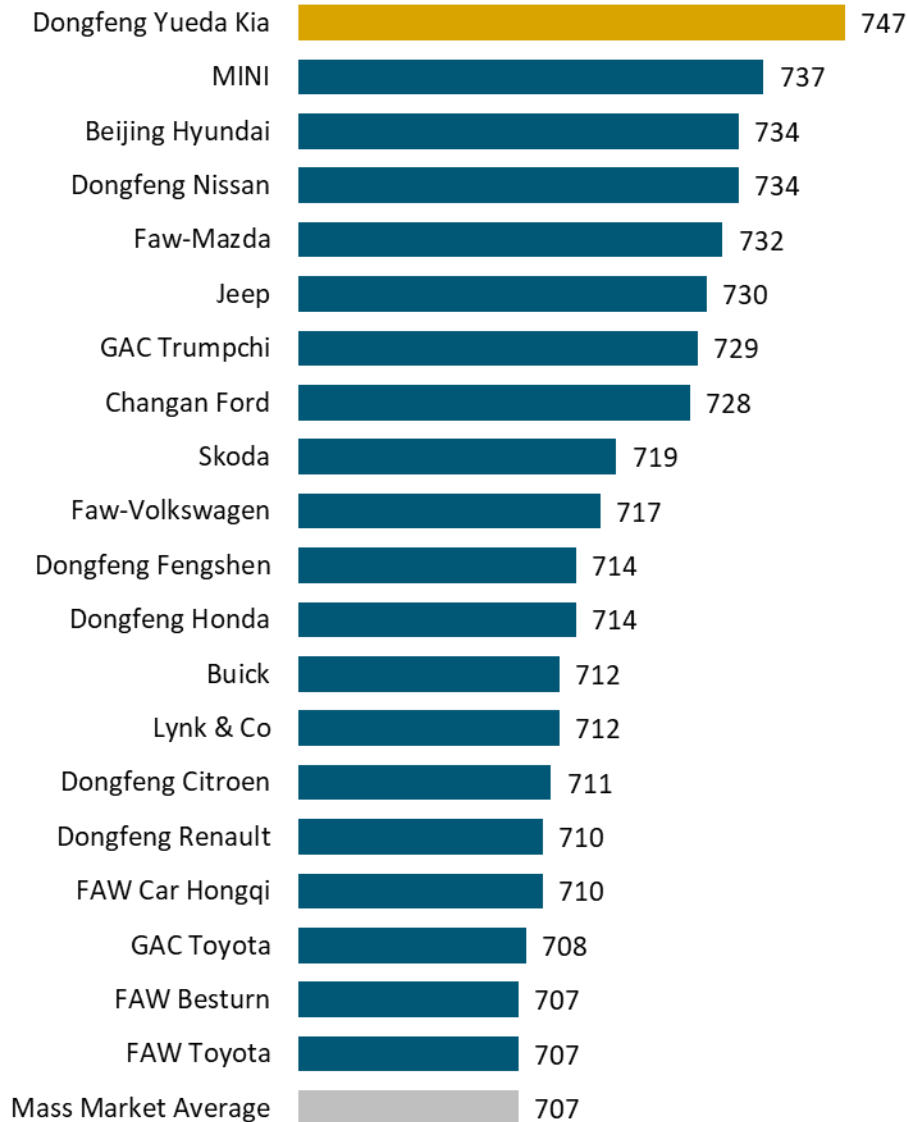
Source: J.D. Power 2019 China Automotive Performance, Execution and Layout (APEAL) StudySM

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2019 APEAL Brand Index Ranking – Mass Market

(Based on a 1,000-point scale)



Source: J.D. Power 2019 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment in APEAL Car Segment

Compact Upper Highest Ranked: Kia K2 Toyota Vios/Vios FS Toyota Yaris L	Midsized Upper Highest Ranked: Mazda 6 Atenza Nissan Teana Ford Mondeo
Midsized Basic Highest Ranked: Hyundai Yuena Verna GAC Trumpchi GA4 Changan Eado XT	Compact Luxury Highest Ranked: BMW 1 Series BMW 3 Series Volvo S60L
Midsized Highest Ranked: Hyundai Lafesta (tie) Nissan Lannia (tie) Hyundai Lingdong Elantra	Midsized Luxury Highest Ranked: Lexus ES BMW 5 Series Volvo S90
Midsized Upper Economy Highest Ranked: Kia K4 Cachet Hyundai Mistra MINI	

* No other model in this segment performs above segment average.

Note: To qualify for an award in the 2019 China APEAL Study, models must meet these criteria: 1. Four models with at least 100 samples, or, three models with at least 100 samples and with more than 80% of market share. 2. At least one model must perform better than segment average. In the Compact Mini Car, Compact Car and Large Luxury Car segments, these criteria were not met, thus no awards have been issued.

Source: J.D. Power 2019 China Automotive Performance, Execution and Layout (APEAL) StudySM

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Top Three Models per Segment in APEAL SUV, MPV Segment

<p>Small SUV</p> <p>Highest Ranked: GAC Trumpchi GS3 Dongfeng Forthing Joyear X5 FAW Xenia R7</p>	<p>Midsize Luxury SUV</p> <p>Highest Ranked: Porsche Macan BMW X3 Volvo XC60</p>
<p>Compact SUV</p> <p>Highest Ranked: Skoda Karoq Hyundai ix25 Nissan Kicks</p>	<p>Large Luxury SUV*</p> <p>Highest Ranked: Porsche Cayenne BMW X5</p>
<p>Midsize SUV</p> <p>Highest Ranked: GAC Trumpchi GS7 Ford Kuga Jeep Cherokee</p>	<p>Compact MPV*</p> <p>Highest Ranked: Wuling Hongguang S/S1</p>
<p>Large SUV</p> <p>Highest Ranked: Nissan Murano Toyota Land Cruiser Prado Skoda Kodiaq</p>	<p>Midsize MPV</p> <p>Highest Ranked: Volkswagen Touran L Buick GL6 BYD Song Max</p>
<p>Compact Luxury SUV*</p> <p>Highest Ranked: BMW X1 Lexus NX</p>	<p>Large MPV</p> <p>Highest Ranked: GAC Trumpchi GM8 Buick All New GL8 Buick New GL8</p>

* No other model in this segment performs above segment average.

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